



Filtering with Excel's PivotTable

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By [Neil J. Rubenking](#)

Is there a way to count the number of occurrences of each name in an Excel column? I know that Auto Filter arranges the names in alphabetical order and does not show duplicates. Is there a way to get something similar with a count of each unique name?

Douglas Banks

How can I filter to show the maximum value in one column across duplicate values in another? For example, I have Parts in column A (many duplicates) and Bids in column B. I would like to know the high bid for each part number in the list.

I also have Customers in column C. Can I show the corresponding customer name for each high bid?

Adam Greenberg

Both problems are solved using Excel's PivotTable function. The first problem is quite simple. Make sure your table has a row of column headings at the top. Click on the letter at the top of the column to select the entire column. Choose PivotTable and PivotChart Report from the Data menu, and then click on Finish. That creates a pivot table using the selected column as input and places the table in a new worksheet.

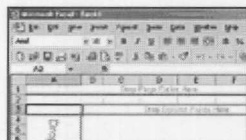


Figure 1

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You'll get a blank pivot table and a field list with just one field (Figure 1). Drag that field into the area marked Drop Row Fields Here, and drag it again into the Drop Data Items Here area. You'll see a table of all the distinct values for that field along with the count of each (Figure 2).

The second problem is also handled using a PivotTable. Start by selecting columns A and B. Again choose PivotTable and PivotChart Report from the Data menu and click on Finish. Drag the Parts field into the Drop Row Fields Here area. Drag the Bids field to the Drop Data Items Here area. Double-click on the Count of Bids label and select Max in the list rather than Count. You now have a table showing the highest bid for each distinct part.

Alas, the pivot table is not all-powerful. It will not automatically find the name of the customer who placed the highest bid. For that, you can use the VLOOKUP function. Since you accepted the defaults during its creation, the pivot table is located at Sheet2!A3. Enter this function in cell D5:

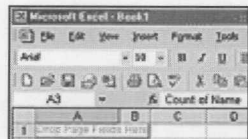


Figure 2

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```
=VLOOKUP(GETPIVOTDATA("Bids",$A$3,"Parts",A5),Sheet1!$B:$C,2,FALSE)
```

Here \$A\$3 is the top-left-hand corner of the pivot table, A5 is the first item in the table, and Sheet1!\$B:\$C identifies the columns containing the bid and customer data. This function locates the first bid that matches the maximum bid from the pivot table and returns the customer name that's in the same row.

Copy this function to the cells below it to get the customers for the other maximum bids. Click on the exclamation point icon in the PivotTable toolbar to refresh the table after making changes to the data. You will have to add or remove copies of the VLOOKUP formula manually if the number of unique parts changes.